OPAS Release Notes

Release 23 – to be installed October 29, 2014

OPAS Functionality

QP#	JIRA#	Solution	What Changed	"How To" Details	Any Known Issues
3899, 3910	1276, 1287, 1346, 1416, 1485	Maintaining Historical Employee Initials	Several updates were implemented that relate to employee initials. (1) The existing "View Shift History" audit trail on a shift has been updated to contain a new header that includes the current employee information of name and initials plus the current shift information. The details portion of each audit trail entry that is captured (e.g., every time the shift is updated) will now display what the employee's initials were at the time of the change. (2) The existing rule that checked employee initials within a single scheduling area has been expanded to check this rule within an entire dataset. Initials may not be set for an employee if they belong to another employee elsewhere in the same dataset. (3) Employees who are set to be retired will no longer have their initials cleared out or displayed as ## in the application. Instead, their initials will be maintained up to and including their last day as an employee, after which time their initials will automatically be updated by adding a <> symbol surrounding them.	When an employee is retired from the scheduling area, his/her initials will automatically go from "XX" to "<XX>". In the case of multiple retired employees with the same initials, the first employee to be retired will have initials "<XX1>," the second will have initials "<XX2>," and so on. All records in OPAS will be automatically updated to have the retired initials. Depending on the effective date selected for the retirement, a dialog box will open stating when the changes to initials will take place. In the case of an effective date in the past, the change to initials will be immediate. For a future effective date, the change will occur the day after the effective date.	

			As an example, if XX is set to retire on November 1, 2014, then they will stay as XX until November 2nd. On November 2nd, their initials will automatically change from XX to be <XX> instead, leaving the initials of XX available for another employee within that Facility dataset to take. When the employee who takes XX as their new initials eventually retires, in order to differentiate between the XX before him, the second employee who retires with XX will be marked as <XX2>. Subsequent employees will be marked as <XX3>, <XX4>, and so on. (4) The employee initials for retired employees will also continue to be displayed in past Employee Bidding calendars. Slots that have been selected / bid upon by the now-retired employee will be labeled with their updated initials (e.g. <XX>) instead of being blank.		
4207	1599, 1601	Supervisor and CIC Access to Schedule Generation	(1) Schedule Generation access has been removed from both CIC and Supervisor authorizations. Both the Home Page view button and the context menu option beneath the Forms dropdown will be grayed out with the precondition of “You are not authorized to execute this response.” (2) The CIC authorization group no longer has the ability to use the Change Shift Line function from the context menu within the Group Schedule form; however, the Supervisor authorization group will still be able to access the Change Shift Line function.		

4073	1639, 1567	Update Maximum Consecutive Working days	The Maximum Consecutive Working Day calculation has been updated to count any day with any scheduled activity (i.e., any non-blank non-RDO day). Specifically, the calculation now includes full days of Leave/Excused Absence (green days) and days that include full shifts of approved Leave/Excused Absence. As a result, Leave days are now properly counted when determining when to display the "Maximum Consecutive Workday" warning when submitting / approving an RDO Change request, a shift swap, or a shift change request, and when displaying the employees available for Overtime within the OT call lists.		
4098, 4130	1641, 1642	Swapping Shifts that contain Holdover OT	Two main changes were made pertaining to shift swaps that contain Holdover OT. The first change pertains to managerial (non-request) swaps, and the second pertains to shift swap requests. Change #1: Managerial Swaps (Schedule Generation form) In the Schedule Generation Form, users can no longer drag-and-drop a shift containing holdover onto another shift to create a managerial swap. When attempting this action, a precondition stating "Shifts that contain Holdover may not be swapped" will display and the swap cannot be completed. Change #2: Shift Swap Request (1) Holdover OT is now associated to a shift and not an employee in order to ensure adequate coverage of a specific time period.		

			(2) When a swap request for employees with different shift durations is approved, they will receive a different start or end time than when the original employee worked it. Depending on the new start time or end time associated with the Holdover shift, the full duration of Holdover OT may no longer be necessary, because the updated shift may have been changed enough to cover that period, either partially or fully. In that case, OPAS will automatically adjust the holdover OT length to ensure the correct portion of the original defined timeframe is covered. (3) When the swap goes through, the Holdover OT is assigned to a new employee. The Application Parameters in the Overtime tab called “Receive OT Count Increases” and “Give OT Count Decreases” dictate how the two employees are charged for the Holdover. If the “Receive OT Count Increases” checkbox is checked, then the person who is newly receiving the Holdover OT will have their Holdover OT balance increased by the amount of Holdover they are now working. If the “Give OT Count Decreases” checkbox is checked, then the person who is no longer working the Holdover will have their Holdover OT balance decreased by the number of Holdover hours that they just gave away. (4) The Holdover Call Lists have been updated to capture the reassignment of the Holdover to the new employee. The list captures the start time of the Holdover portion assigned to the new employee, including if that start time has now been changed. If the result of the swap is that the Holdover is no		

			longer necessary, the existing call record for the original employee's call is updated to be "Cancelled" instead of "Assigned." A new call record in this case is not created because the second employee is not assigned Overtime.		
4208	1659	Update printed Day of Operation report to include ATA	In the printed out Day of Operation report, a new column has been created for employees working ATA shifts. Employees who are of the ATA role and employees working a shared shift that was shared as an ATA shift will both be visible within this new column in the HTML report.		
4209	1514, 1537	Credit Hours and Overtime accrual	A scheduler can now choose whether a Comp Time or Credit hours activity will be charged to an Employee's OT balance or not. When drag-and-dropping Comp Time or Credit Hours onto a shift, a new dialog will appear that provides two options for the scheduler: either "increase the employee's OT balance" or "do not increase it." This will apply the decision to the employee's Overtime balance, and the balance will either increase or remain the same. The Comp Time/Credit Hours dialog will default to the "Not increase the employee OT balance" option. An audit trail entry in the shift's history will also capture the decision that the scheduler made. When involving the Comp/Credit activities (either Full Shift or Holdover) in a shift swap, employees will have their OT balance charged based on the following rules: a. If the original assignment of the Comp/Credit did not charge the original employee who worked it, then the subsequent reassignment of that shift (from manual drag-and-drops and approved Shift	When assigning comp/credit time to a shift using the "Edit Shift Detail" functionality in Schedule Generation and Group Schedule, the scheduler will be prompted by a dialog box to decide whether or not the comp/credit time will increase the employee's overtime balance.	

			Swap requests) will not charge anybody else either, regardless of what the "Receive OT Count Increases" and "Give OT Count Decreases" Application Parameter checkboxes say. It will be considered a "balance-less" shift. b. If the original assignment of the Comp/Credit did charge the employee, then it is considered as "having a balance" and will be susceptible to the existing rules that are linked to the two checkboxes within the Application Parameters; it will not be treated any differently than a regular OT shift. The "Receive OT Count Increases" and "Give OT Count Decreases" checkboxes in the APs will determine what happens to the Initiator's OT balance and to the Recipient's OT balance.		
4210	1587	Leave/Absence Types not accurately pushing to CRU	OPAS will now push more specific CRU codes for Leave requests if certain FMLA reasons and/or Sick reasons are associated with the request. Instead of pushing the standard leave codes (e.g. "Annual Leave" or "Sick Leave"), OPAS will be able to recognize when certain details are present within a request and be able to push different leave codes (such as "Family Lv - AL" and "Family Lv - Self SL"). The links between a CRU code and all possible combinations of Leave/Absence types, FMLA reasons, and/or Sick reasons are now maintained within Knowledge Tables (KTs). Each type of individual Leave type and Excused Absence type will also be maintained in separate KTs. The ability to create, modify, and delete these Leave/Absence types will be done within the KT and then synced back into the Data Maintenance application.		

4034	1361	Overtime Reason for Sick Leave is displayed	CPCs and CICs will no longer see the true Overtime reason associated with an Overtime activity / shift. Instead, CICs and CPCs will see a generic phrase of “Staffing” when attempting to view any Overtime details. This includes the following locations: (1) Hovering over the Overtime shift in Group Schedule. (2) Hovering over the Overtime shift in Day of Operation form. (3) Viewing the "Overtime Calls Report" (located under the Reports menu) - the "Reason" column will say "Staffing" at all times for CPCs/CICs. (4) Viewing the "Employee Overtime Instances" Report (located under the Reports menu) - the "Shift Details" column will say "Staffing" when it pertains to the OT portion of the shift. (5) Viewing the "Print Overtime Assignment" report (located in an OT shift's 'Schedule Reports' nested context menu) - when opening this HTML report, the Reason column will show "Staffing" if a CPC or CIC is opening the report. (6) Opening the "Generate Day of Operation Report" (located in the Day of Operation form) - the OT section's Reason column will show "Staffing" if a CPC or CIC is opening the report. Supervisors, Non-Viewing Schedulers, Viewing Schedulers, Facility Level Administrators, and Administrators will still continue to see the true Overtime reason associated with Overtime activities / shifts.		

4211	1697	Ability for CPCs to add columns with private information	The ability for the CPC authorization group to right-click within column headers has been removed. This will prevent them from accessing the context menu completely, which will prevent them from adding/removing columns. The ability to right-click within column headers is still allowed for CICs, Supervisors, Non-Viewing Schedulers, Viewing Schedulers, Facility Level Administrators, and Administrators.		
4074	1640	Update Rule Checking	RDO swap functionality has been updated to prevent illegal RDO swaps, to include business rule checking, and to include a brand new RDO Swap dialog. Illegal swap prevention: a. RDO Swap requests cannot be submitted when one of the shifts involved is a shared shift. The precondition states “Shared shifts may not be involved in an RDO Swap request.” b. RDO Swap requests cannot be submitted when the shifts involved are different Activity types. The precondition states “Shifts of different Activity types may not be involved in an RDO Swap request.” c. RDO Swap requests cannot be submitted when the shifts involved are for different Roles, including converted CIC shifts. The precondition states “Shifts of different Roles may not be involved in an RDO Swap request.” d. RDO Swap requests cannot be submitted when the shifts involved contain any portion (i.e. Holdover) of Overtime, Comp Time, or Credit Hours activities. The precondition states “Shifts containing Overtime / Comp / Credit activities may not be		

			involved in an RDO Swap request." e. RDO Swap requests cannot be submitted when the RDOs involved contain Overtime, Comp Time, or Credit Hours shifts (i.e. Full Shifts) assigned that day. The precondition states "RDOs containing Overtime / Comp / Credit activities may not be involved in an RDO Swap request." f. RDO Swap requests cannot be submitted when the shifts involved are different durations. The precondition states "Shifts of different durations may not be involved in an RDO Swap request." g. RDO Swap requests cannot be submitted when the shifts involved contain full or partial Leave or Absence. The precondition states "Shifts with Leave/Absence activities may not be involved in an RDO Swap request." Business Rule checking: The following business rules will be flagged in a warning dialog during both request submission and request approval. a. Working hours in a week calculation: The check will determine if either employee would result in having a working hours violation, either too many hours in their week or too few hours in their week. b. Rest time violations: The check will determine if either employee would result in having a rest time violation, either after their previous shift or before their next shift. c. Maximum consecutive workdays violation: The check will determine if either employee would result in having too many working days in a row. d. Midnight qualification checking: The check will determine if either employee would result in having		

			a Midnight shift assigned to them when their Midnight qualification is set to False. New RDO Swap dialog: a. The dialog will automatically open when an RDO is dragged to another RDO. b. Drag-and-drop will be the only action that opens this dialog; there is no RDO Swap context menu item or RDO Swap Quick Link. c. This dialog will be pre-populated with the details of the swap. d. The Initiator will be the drag-and-dropper; the recipient will be the person it was dropped on. The Swap Preview panel will display the changes that the both the Initiator and the Recipient will end up with as a result of the swap being approved. e. Upon hitting OK, if any business rules listed above are violated, a warning dialog will appear displaying the rules that are broken and for whom. f. A second dialog exists for approving and denying the RDO Swap that will open when the user right-clicks on the RDO Swap request and selects "Open Request." g. The RDO Swap request will go through the same actions required for approving a Shift Swap request. First, the swap must be accepted by the 2nd Employee (the Recipient). Similar to shift swaps, this 2nd Employee acceptance may be done either by the Recipient himself or via proxy by an authorized user. The ability to accept/decline and approve/deny RDO Swaps from OPAS Lite has been updated and the rule checking when doing those actions has been		

			implemented. However, an RDO Swap request cannot be made from OPAS Lite.		
4177	N/A	Moving a Sunday 23:54 midnight shift with partial leave	An issue was discovered when using "Move Shift" on a true midnight shift that contained leave. Moving a true midnight shift (23:54) that contained Leave was not creating the activities on the shift correctly; furthermore, moving the shift back to be a 23:54 start time was not working correctly either. This has been corrected, and the following existing rules will now be correctly applied to midnight shifts with leave: -If the leave covers the full shift, then the leave should still cover the entire shift if moved. This will use generic time frame rules. -If the leave is partial leave, then the leave stays in the same time frame as requested. This will use specific time frame rules. -If leave is adjacent to the OT on a 23:54, the 6 minutes of OT is removed.		
4197	N/A	Editing temporary shift line converts days to RDOs	An issue was discovered when editing a Shift Line Change for an employee. When editing a Shift Line Change from its first day, the schedule was incorrectly converted to all RDOs instead of correctly capturing the edited shift line's new RDOs. This has been corrected.		
4181, 4180	N/A	Inconsistency with "Return to" shift assigned, OT at start vs. OT at end	An issue was discovered where Holdover OT was being added back to a shift under certain circumstances when approving a cancellation request. This led to an incorrect (and inconsistent) total duration for that shift. Holdover that exists or used to exist on the shift should not be added back on to the "return to" shift the employee is		

			requesting to work. The functionality has been corrected such that Holdover will never be added back to a "Return to" shift under any circumstances, regardless of whether the Holdover was at the start of the shift or at the end of the shift.		
4225	N/A	Shift Line Setup form: Warning regarding Year Plan / Role	When the Shift Line Setup form first opens, the user must select a year and a role before they can begin entering/reviewing data. To help planners remember this step, a warning label has been added to the top of the Shift Line Setup form that reads "Please select a year / role to begin planning." This warning will disappear when both a Year Plan and a Role have been selected from the dropdowns.		
4226	N/A	Shift Line Setup form: Warning for no curve marked as "Used for Scheduling"	When a curve is not marked as "Used for Scheduling," there are certain planning actions in the future that will not be able to be completed until this step is performed. In order to help users remember to do this step, the Shift Line Setup form will display this warning if the selected Year Plan and Role from the dropdowns do not have a corresponding curve that's marked as "Used for Scheduling." This warning will read "There is no curve marked as used for scheduling for the selected year / role."		
4227	N/A	Shift Line Setup form: Adding "Duration" column by default to Work Pattern dialog	Within the Shift Line Setup form, the “Create Work Patterns” dialog has a tab for Shift Definitions. This tab's panel has been updated to automatically include the "Duration" column by default for all users who can access this dialog. This will make it easier for users to distinguish which Shift Definition they would like to add to the Work Pattern without personally calculating the duration between the		

			start time and end time of the shift.		
4228	N/A	Able to assign Full Shift OT to employees on approved full shift Leave	An issue was reported where it was possible to assign a full shift of OT to an employee who had a full shift of approved Leave on that same day. Employees with a full shift of approved leave shouldn't be eligible to work OT, just the way that employees on a full day of Leave aren't eligible to work the OT. To resolve this, the existing feedback that applies to full days of Leave ("Cannot assign overtime on a Leave day") has been extended to apply to full shifts of Leave as well. Any employee with a full day of leave or a full shift of leave will share this same precondition within the Overtime call list.		
4235	N/A	New dialog for Employee retirements	A new explanatory / warning dialog has been created when retiring employees within Manage Employees. Depending on the date selected in the Retirement dialog, the warning will explain what will happen to the employee's initials: (1) If the employee is being retired as of today's date or forward, the dialog will say "User's retirement is effective as of <date>; changes to their initials will be reflected in the system as of <date + 1>." (Example: 10/01/14 and 10/02/14, respectively) (2) If the employee is being retired for a date in the past, the dialog will say "This employee's initials will change from XX to <XX> immediately." In both scenarios, the dialog will contain both an OK	When an employee is retired from the scheduling area, his/her initials will automatically go from “XX” to “<XX>”. In the case of multiple retired employees with the same initials, the first employee to be retired will have initials “<XX1>,” the second will have initials “<XX2>,” and so on. All records in OPAS will be automatically updated to have the retired initials. Depending on the effective date selected for the retirement, a dialog box will open stating when the changes to initials will take place. In the case of an effective date in the past, the change to initials will be	

			button and a Cancel button. Pressing OK will proceed with retiring the employee; pressing Cancel will return the user back to the Retirement dialog's calendar.	immediate. For a future effective date, the change will occur the day after the effective date.	